

UNIT 49 PREPARING PURCHASE ORDERS AND AWARDS

_____ has satisfactorily completed on-the-job training in the Part or Parts of this Unit specified below.

Certification for Part A: Make Final Award Decision In Sealed Bidding

Duty	Prepare contract and document the recommendation for award.
Conditions	Given an IFB, amendments to the IFB, the bid in line for award, and other bids.
Overall Standard(s)	The contract is properly prepared and includes all elements for a legal contract. Documentation of the award provides sufficient detail to allow accurate reconstruction of the procurement for immediate review and future reference.
Evaluator	Name _____ Title _____ Date _____

Certification for Part B: Make Final Award Decision In Competitive Negotiations

Duty	Prepare contract and document the recommendation for award.
Conditions	Given an RFP, amendments to the RFP, the offer in line for award and revisions to that offer, the PNM, and other offers.
Overall Standard(s)	The contract accurately conveys that which was contemplated by the parties (as reflected in the RFP, offer, and price negotiation memorandum, taken together). The contract is properly prepared and includes all elements for a legal contract. Documentation of the award provides sufficient detail to allow accurate reconstruction of the procurement for immediate review and future reference.
Evaluator	Name _____ Title _____ Date _____

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Certification for Part C: Prepare Purchase Orders

Duty	Prepare purchase orders and document award.
Conditions	Given an RFQ, the quotation in line for award, and other quotations (if any).
Overall Standard(s)	The purchase order is properly prepared and includes all elements for a legal offer. Keep documentation to a minimum. When other than price-related factors are considered, document the file to support the final award decision. If only one source is solicited, include a note explaining the absence of competition (except for acquisition of utility services available only from one source).

Evaluator	Name	_____
	Title	_____
	Date	_____

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DOCUMENTATION OF OJT ASSIGNMENT(S)	
Description of Assignment:	
Evaluation:	
Completion Date:	

As needed, insert additional pages to record OJT assignments.

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Policies

<i>FAR</i>	<i>Agency Suppl.</i>	<i>Subject</i>
3.406		Awarding before receipt of SF 119 (contingent fee rep.).
4.802 4.803(a)		Contract file requirements.
7.306		Awards under cost comparison procedures.
8.203-2		Procedures for annotating and forwarding jewel bearing certificates.
13.106-2(c)		Award under SAT.
13.5		Purchase orders.
14.103-2 14.407-2		Limitations on awarding as a result of sealed bidding.
14.201-1(c) 14.407-1(c)(3)-(5) 14.407-1(d) 15.406-1(b)		Instructions on preparing and awarding contracts.
14.404-2(j)		Documenting bid rejections.
14.407-1(b)		Procedures when less than 3 bids were received.
14.407-7		Documentation of award.
15.608(b)		Rejecting all proposals.
15.611(d)		Selecting the source whose best and final offer is the most advantageous.
19.506 20.205		Withdrawal or modification of a set aside.
32.702 32.703		Funding requirements.
52.214-10 52.215-16		Contract Award.
52.215-19		Period for acceptance of offers.
52.252-2 52.252-4 52.252-6		Incorporation by reference, alterations, and deviations.

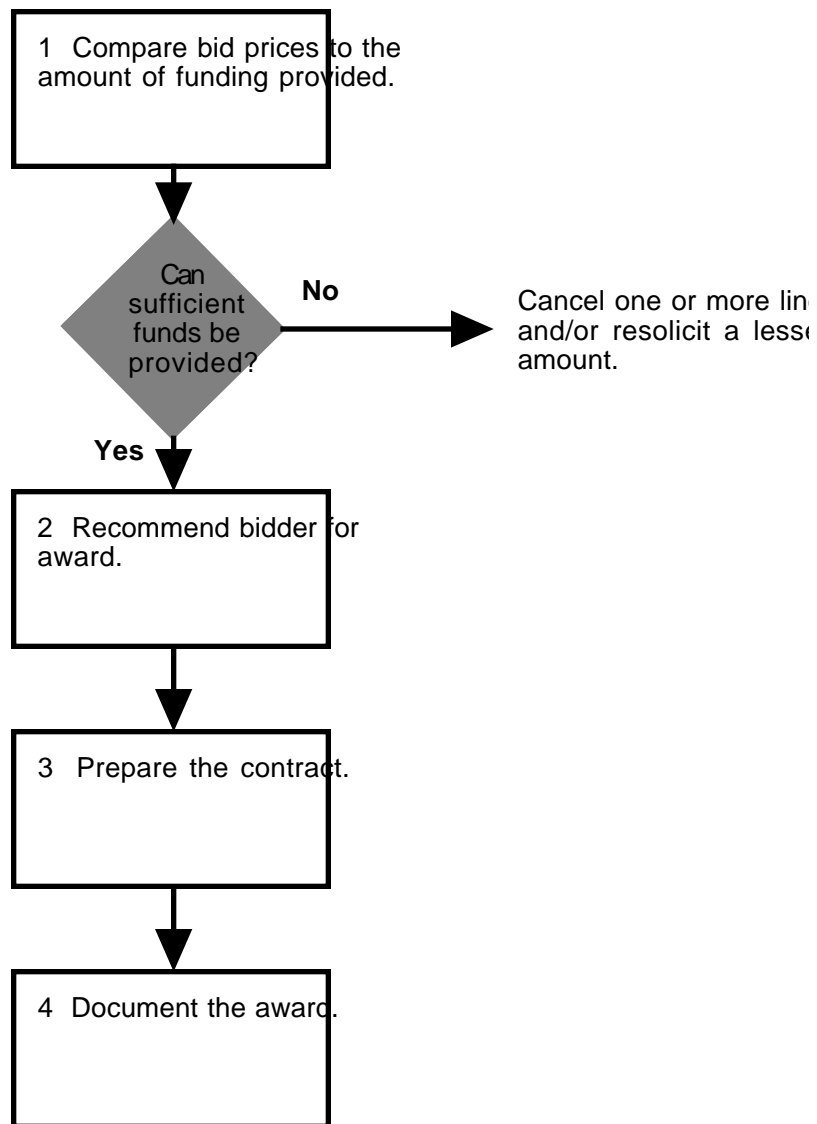
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Other KSA's

1. Knowledge of the nature and elements of enforceable contracts, including requirements with respect to capacity, offer, acceptance, consideration, certainty of terms, and lawful purpose; knowledge of rules and precedents in contract interpretation and skill at drafting contracts that are likely to be interpreted as the Government intends them to be interpreted under those rules and precedents (from Business Law).
2. Skill at communicating and exercising leadership in preparing and recommending awards (from Organization and Management).
3. Knowledge of Comptroller General decisions and other case law on the role and discretion of the Source Selection Authority in making the final award decision.

Other Policies and References (Annotate As Necessary):

Make Final Award Decision In Sealed Bidding



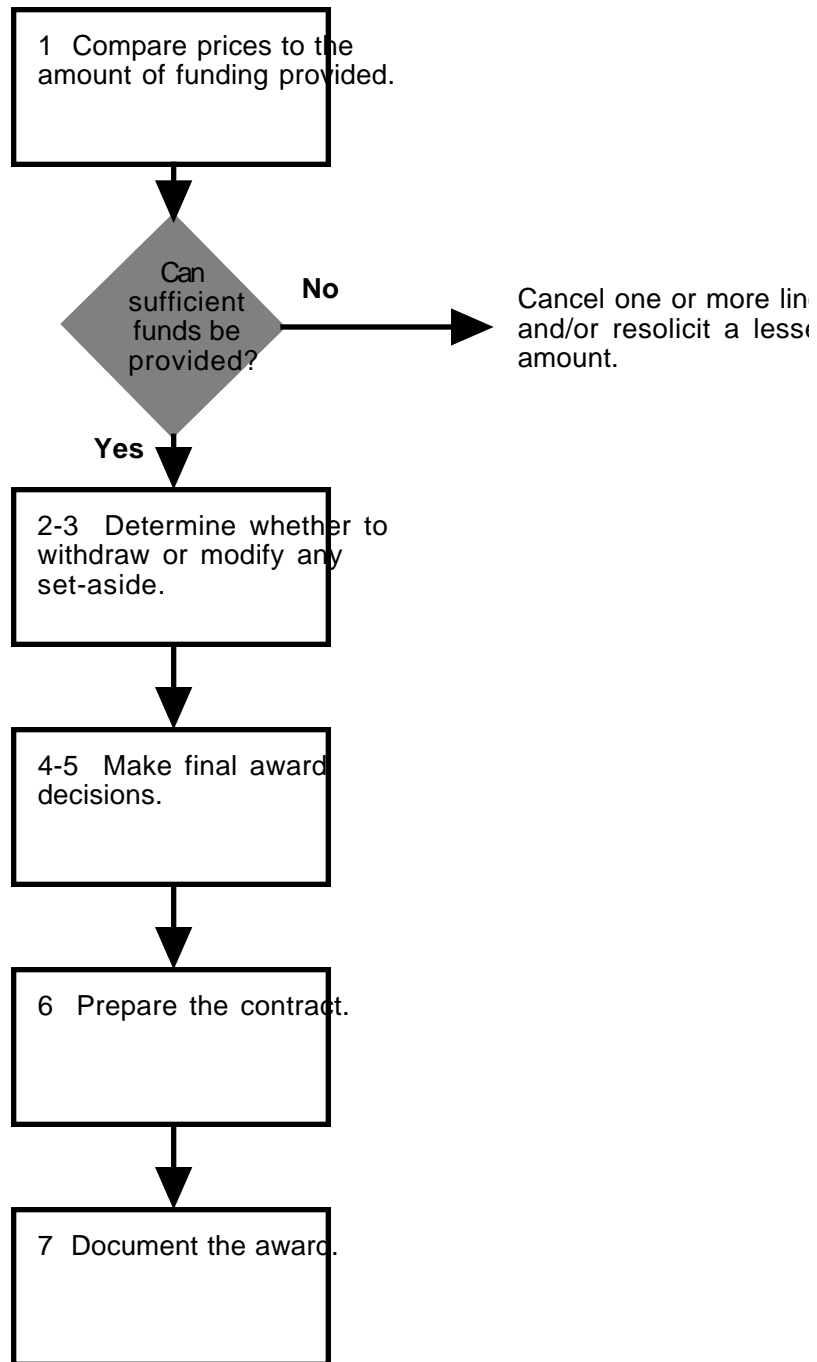
UNIT 49 PREPARING PURCHASE ORDERS AND AWARDS

Part A: Make Final Award Decision In Sealed Bidding

Tasks	Related Standards
<p>1. Compare bid prices or negotiated prices to the amount of funding provided and advise the requiring activity of any additional amount needed.</p> <p>If the requiring activity has no additional funds, cancel one or more line items and/or resolicit a lesser quantity.</p>	<p>A1. Before executing any contract, obtain written assurance from responsible fiscal authority that adequate funds are available (unless the contract is expressly conditioned upon availability of funds per FAR 32.703). If the contract is conditioned upon the availability of funds, prohibit acceptance of any deliverable until the contracting officer gives written notice to the contractor that funds are available.</p>
<p>2. Recommend bidder for award; brief superiors, as required, on selection recommendation.</p>	<p>A2. Award recommendation should conform to FAR 14.103-2 and 14.407-2. If less than 3 responses had been received to an IFB, investigate the reasons and recommend corrective actions for future procurements.</p>
<p>3. Prepare contract.</p> <p>Subtasks:</p> <ul style="list-style-type: none"> • Formulate contract to include elements of the IFB, amendments thereto, and the bid • Establish effective date. • Make duplicate originals of contract. • If an offer from a SF 33 leads to further changes, prepare the resulting contract for bilateral signature on SF 26, Award/Contract.¹ 	<p>A3. Include all elements for a legal contract (capacity, offer, acceptance, consideration, certainty of terms, and lawful purpose). Do not physically include Part IV of the IFB (when using the Uniform Contract Format) but retain it in the contract file. (Award by acceptance of a bid on the award portion of SF33 or SF26 incorporates Section K representations, certifications, and other statements of the bidder in the resultant contract even if not physically attached.)</p>
<p>4. Prepare documentation of award (especially if the award is to other than the low bid) and update the contract file.</p>	<p>A4. Award documentation should conform to FAR 14.404-2(j) and 14.407-7. Reasons for rejecting lower bids should be in sufficient detail to justify the award. The contract file should conform to FAR 4.803 and stand alone as a complete record of the procurement, capable of being reviewed by others without reference to additional documentation.</p>

¹FAC 84-53

Make Final Award Decision In Competitive Negotiations



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Part B: Make Final Award Decision In Competitive Negotiations

Tasks	Related Standards
1. Compare negotiated prices to the amount of funding provided and advise the requiring activity of any additional amount needed.	B1. If the requiring activity has no additional funds: <ul style="list-style-type: none"> • Cancel and/or resolicit. • Amend the RFP.
2. Determine whether to withdraw or modify any set-aside.	B2. Withdraw or modify a set-aside if no responsible small business has submitted a responsive offer at a fair market price.
3. Notify the agency small and disadvantaged business utilization specialist and/or SBA to initiate withdrawal or modification of the set-aside.	
4. Make final evaluation decisions. Options: <ul style="list-style-type: none"> • Award without discussions (from Unit 42). • Award after discussions (from Unit 45): <ul style="list-style-type: none"> - Assure proposed award is in accordance with proposal. - Dispose of late BAFOs. • Reject all offers. 	B4. Award recommendation should conform to FAR 15.611(d). Any decision to reject all offers should be made as prescribed in FAR 15.608(b) and with approval of the agency head.
5. Brief superiors, as required, on selection recommendation.	B5. In formal source selections, forward the award recommendation to the Source Selection Authority and obtain the SSA's decision.
6. Prepare contract. Subtasks: <ul style="list-style-type: none"> • Formulate contract to include elements of the RFP, amendments thereto, and the offer, as negotiated. • Establish effective date. • Obtain from the contractor any outstanding certificates or representations required before award (e.g., the jewel bearing certificate and the SF 119). • Make duplicate originals of contract. 	Include all elements for a legal contract (capacity, offer, acceptance, consideration, certainty of terms, and lawful purpose). Do not physically include Part IV of the RFP (when using the Uniform Contract Format) but retain Section K in the contract file and incorporate it by reference in the signed contract.
7. Prepare documentation of award (especially if the award is to other than the low bid), and update the contract file.	B7. Contract file should conform to FAR 4.803, 19.506, and 20.205.

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Part C: Prepare Purchase Orders

Tasks

Related Standards

1. Incorporate terms and conditions from the RFQ, as modified based on discussions (if any) with the quoter(s).

Std: Include any trade and prompt payment discounts from the quotation. Each purchase order shall contain a determinable date by which delivery of supplies or performance of services is required

2. Determine whether or not to require written acceptance of the order by the vendor prior to performance (e.g., bilateral rather than unilateral).

- Through a special note, typed or stamped on the face of the purchase order.
- Specify a deadline for indicating acceptance.

3. Complete order.

- FACNET
- Written

4. Issue order

- By mail or courier.
- Electronically.

5. Document award.

Std. Keep documentation to a minimum.

When other than price-related factors are considered, document the file to support the final award decision.

If only one source is solicited, include a note explaining the absence of competition (except for acquisition of utility services available only from one source).

Oral solicitations: Establish and maintain informal records of oral price quotations in order to reflect clearly the propriety of placing the order at the price paid with the supplier concerned (e.g., by showing the names of contacted suppliers contacted and the prices and other terms and conditions quoted by each).

Written solicitations: Limit written records to notes or abstracts to show prices, delivery, references to printed price lists used, the supplier or suppliers contacted, and other pertinent data.

Retain data supporting purchases (paper or electronic) to the minimum extent and duration necessary for management review purposes (see FAR Subpart 4.8)

If only one response is received, include a statement in the contract file giving the basis of the determination of fair and reasonable price.